



# consultations

To assist and inform the diplomatic community

## New Merger: Production Unit (Office of Protocol) and Program Support Unit (OFM)

On October 1, the Office of Protocol's Production Unit merged with the Office of Foreign Missions' Program Support Unit. With this action, the Protocol functions of notification, and termination of status of foreign diplomatic community members transferred to OFM. These functions are the foundation for processing vehicle registrations and titles, driver licenses, sales, gas and utility tax-exemption requests, duty-free importation requests and property approvals. The merger will enable OFM to provide better service.

The merger is the first phase in a comprehensive effort to streamline the process by which OFM offers benefits and services to the foreign diplomatic community. After we incorporate the recommendations of several embassies, we will issue a CD-ROM containing all the OFM forms to enable missions to complete and print OFM forms on their computers. See article on "Going Digital Soon" on page 3. Ultimately, the number of forms needed to obtain most benefits will be reduced to only one or two.

The office locations remain the same, but applications and correspondence previously sent to Protocol's Production Unit should be addressed as shown in the table below:

Type of Request	Form	Courier or Mailing Address
Notification of Appointment of Foreign Diplomatic Officer and Career Consular Officer	DS-2003	Office of Foreign Missions ATTN:DS/OFM/VTC/PU U.S. Department of State 3507 International Place, NW Washington, DC 20008
Notification of Appointment of Foreign Government Employee	DS-2004	
Notification of Appointment of Honorary Consular Officer	DS-2005	
Notification of Dependents of Diplomatic, Consular and Foreign Government Employees (Continuation Sheet)	DS-2007	
Notification of Change Identification Card Request	DS-2006	
Notice of Termination of Diplomatic, Consular, or Foreign Government Employment	DS-2008	
Dependent Work Permits	I-566	
Visa Adjustments	I-566	



**Theodore E. Strickler**  
Deputy Assistant Secretary

A year ago, the Office of Foreign Missions launched the first issue of *Consultations*, with the intent to provide a more informal way of communicating with our diplomatic and consular "customers." We hope we have succeeded in that attempt.

It may interest our readers to know how *Consultations* is prepared and published. Most of the articles are written at OFM's headquarters in Washington, DC, and are then sent via facsimile to an editor in McLean, Virginia. The approved text and any production materials such as photographs are sent by commercial courier to the Regional Printing Center at the American Embassy in Manila. There the text is formatted using the current style and layout. A copy is then sent back to us by e-mail for final approval. Once we are satisfied that everything is as it should be, we give the Manila Regional Printing Center the go-ahead to start the presses. The printed copies are then sent by a commercial courier to Washington, where we address them for distribution to our readers.

As we enter our second year of publication, we look forward to providing more helpful and comprehensive information to members of the diplomatic and consular corps. We are working on a number of projects to improve OFM's service. We will be telling you more about them in future issues.

As the year 2000 draws to a close, my colleagues in OFM join me in wishing you the best for the holiday season and a prosperous New Year.

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## OFM Procedure

### Understanding Your Telephone Bill

As you read this article direct your attention to the numbered circles on the telephone statements below.



### Verizon's New eTRAK Customer Bill

#### The Statement Redesign

Five years ago, Verizon (formerly Bell Atlantic) began a massive effort to redefine its customer care and billing systems. This effort included a new bill format and design. Verizon, along with

Intersearch Corporation, gathered information on billing from customer focus groups from Maine to Virginia. Verizon used that customer input to produce a bill that is easier to read and understand.

**Account Summary/Payment Stub**

- BILLING DATE & ACCOUNT NUMBER:** The bill covers charges up to this date. Be sure to verify your account number to your check.
- ACCOUNT SUMMARY:** This is an overview of your entire monthly charges, with each type of charge listed separately. A detailed breakdown of each charge can be found on subsequent pages. The Account Summary includes the total amount due and the date your payment is due.
- BILL MESSAGES:** Information about special promotions and money-saving options will be found in this area.
- PAYMENT STUB:** See all this period and check it with your payment.

**Monthly Credits/Charges**

- CREDITS AND ADJUSTMENTS:** The section will reflect any credits or adjustments made to your account during this billing period.
- MONTHLY CHARGES:** The fixed charges you pay at a monthly basis.
- OTHER SERVICES AND CHARGES:** Special charges for Services: long-distance calls, Home Voice (that cover charges in real-time) and surcharges.

**Service Record**

- BELL ATLANTIC SERVICE PROVIDED INFORMATION:** List the products, services and any applicable discounts that are included to your monthly charges. This page will be provided monthly and if you make a change to your monthly service.
- QUESTIONS:** Call these numbers if you have any questions about your bill, or to request an order for service.



## Frequently Asked Questions



### Q. What are All Those Taxes, Fees, and Surcharges on My Telephone Bill?

**A:** Various taxes, fees, and surcharges will likely appear on your bill in addition to the charges you pay for the services you use. Local phone companies on behalf of government entities collect taxes. Some fees and surcharges billed by telephone companies cover the costs of carrying out government-mandated programs; others are intended to recover portions of their operating expenses. Terminology may vary slightly by state.

### Q. Are Federal, state, and local taxes always included on the telephone bill?

**A:** A Federally mandated excise tax of 3% is levied on both local and long distance charges. State and local or municipal taxes may be levied depending on where you live.

**NOTE: On a reciprocal basis foreign missions and their personnel may be exempt from Federal, State, and local taxes.**

### Q. What is a Federal Universal Service Fund Surcharge?

**A:** The Federal Universal Service Fund (also known as a Lifeline Surcharge) provides funding for telecommunications services and products associated with connecting schools, libraries and rural health care facilities to the Internet, and for telecommunications services in parts of the country that are expensive to serve. Telephone service provides a vital link to emergency services, to government services, and to surrounding communities, Congress mandated this universal service support in the Telecommunications Act of 1996.

### Q. What is a 911 Fee?

**A:** The 911 charge is a fee assessed by the city or county to pay for local 911 emergency services.

### Q. What is Telecommunications Relay Center Surcharge?

**A:** A Relay Center Surcharge is a charge used to assist those with hearing or speech disabilities in communicating over the telephone network using special phones.

### Q. What is a Federal Subscriber Line Charge?

**A:** The subscriber line charge is part of a program for local telephone companies to recover the cost of connecting individual phone lines to the interstate long distance network. These costs include telephone wires, poles, and other facilities that link each telephone subscriber, or customer, to the telephone network. The Federal Subscriber Line Charge is not a tax.

### Q. What is a Local Number Portability Surcharge?

**A:** Portability is a service that provides residential and business telephone customers with the ability to retain, at the same location, their existing local telephone numbers when switching from one local telephone service provider to another. Telephone number portability may not be available in all service areas. Local telephone companies can only charge customers in areas where local telephone number portability is available. Congress mandated local telephone number portability to promote competition in the local telephone market in order to increase the choice of providers and telecommunications services, which should, in turn, lower prices for consumers.

See the Federal Communications Commission website [www.fcc.gov/cib/consumer](http://www.fcc.gov/cib/consumer) for more information on fees, surcharges, and taxes. Other websites that may be useful in understanding your phone bill are [www.nclnet.org/phonebill/index.html](http://www.nclnet.org/phonebill/index.html) and the United States Telephone Association website [www.usta.org/navigbill.pdf](http://www.usta.org/navigbill.pdf).

Verizon's new bill is larger. Each page is 7"x11" – similar to bank statements and credit-card bills – and includes billing information on both sides of the page. Account summaries and the payment stub are consolidated on the first page. Clear language is used for product names and service charges.

The new bill has the same format for both business and residential customers. However, since business and residential customers have unique needs, there are differences in the display and layout of these respective bills.



Faces of OFM



**CONSTANCE L. PARKER**

Connie Parker has been assigned as OFM's Travel/Property Officer. As a Foreign Service spouse she has performed a number of roles including teaching art and English as a second language, and more recently, administrative support at U.S. posts in Mexico City, Mexico and Lagos, Nigeria. Ms. Parker regards her role in OFM as a welcome career change. Having traveled abroad since the mid-1970s, she knew the value of reciprocal arrangements in guaranteeing a high quality of life away from home. Ms. Parker speaks Spanish.

**ED LUNA**

Ed Luna has been assigned to OFM's Administrative Office as Acting Director. Mr. Luna began his career as a Foreign Service Officer in 1967 and has held financial management assignments in Latin America, Central America, Europe, Africa, and the Pacific. He enjoyed all his tours, but feels his greatest contribution was his assignment to Rangoon, Burma, where he found himself with a unique opportunity to deal with important issues. His most recent financial management assignment was in Mexico City where he managed a complex financial operation in the American Embassy. During his tenure at OFM, he hopes to improve the workings of the Administrative Office and the support it provides. Mr. Luna speaks French and Spanish.

**BARBARA A. MATCHEY**

Barb Matchey has been assigned as Assistant to Deputy Assistant Secretary Theodore Strickler. Ms. Matchey joined the Foreign Service and has held assignments in Latin America, Europe, Africa, and Asia. In the role of personal assistant to ambassadors, she faced daily challenges and a variety of tasks, and frequently had to make decisions in the absence of the Ambassador or Deputy Chief of Mission. Ms. Matchey regards her assignment to Korea as an exciting career highlight. She has spent the last few years in Asia; her most recent assignment was in Taipei, Taiwan. As she has been away from the United States for more than 20 years, she hopes to reacquaint herself with the U.S. and workings of the State Department in her new role at OFM. Ms. Matchey speaks Spanish, some Italian, Korean and Chinese.

**(Telephone Bill continued from pg 2)**

A page header is displayed at the top of each page. The page header contains important account information.

The account billing date includes charges up to the billing date. There is also a Verizon account number listed on the page and a service center contact number (see circle 9) for customer billing inquiries.

**The Account Summary Page**

The account summary payment stub is on one page (see circles 1,2,3,4). The account summary is an overview of all charges included on the bill. It gives the customer a summary of the current month's charges in segments (see circle 2):

- the dollar amount of charges billed the previous month
- all payments and credits applied to the previous month's charges
- all charges for the current month from Verizon and other service providers
- total amount due for the current month and the date the payment is due

The payment stub is displayed at the bottom of the first page (see circle 4). The stub is perforated for detachment and should be returned with the customer's payment.

**Monthly Credits/Charges Statement**

Charges on the bill are grouped into sections and identified by a heading that indicates the type of charge included in the section (see circles 5, 6,7). The dollar amount for each billing section is highlighted for the customer's convenience.

Each billing section categorizes the charges for display on the bill, i.e., monthly charges, payments, taxes and surcharges.

One billing section called "Additions and Changes" displays changes to the account since the last billing date. The Additions and Changes line is also included in the account summary.

Charges for each phone service provider are displayed on a separate bill page. The page clearly identifies the service provider by name and logo, along with contact numbers for customers to call with any billing inquiries.



Robert Mattox, Director of OFM Information Management weighs choices: More than a pound of paper or a featherweight CD-ROM.

**Going Digital Soon!**

**By Robert Mattox, Director of Information Management**  
Office of Foreign Missions

The Office of Foreign Missions (OFM) is finally going digital! A one-year development effort has come to a close with the upcoming release of OFM's Forms application. Utilizing Microsoft's Internet Explorer Web browsing technology, the OFM Forms application will allow missions to quickly complete a variety of forms required to apply for services from the Office of the Chief of Protocol (S/CPR) and OFM. This is just the first step to providing a panoply of services online to the diplomatic community.

OFM Forms allows a mission and its employees to prepare any form currently used by either S/CPR or OFM to apply for services. The application includes basic error-checking to help ensure accuracy, and helps streamline the application process by providing a simple "one-stop shopping" option for new members of the diplomatic community.

## The Foreign Diplomatic and Consular Corps in the United States

1/2 2+ 5

Embassies	176
Consulates	500
Honorary Consuls	900
Total number	1576

### (Going Digital Soon! continued from pg 3)

It also allows users to recall information used in the preparation of a form for use in the preparation of a new form or to modify an existing form. In addition to the OFM Forms application, an indexed and searchable copy of the most recent *Guidance for Administrative Personnel* (September 1998)\* is included in Adobe Acrobat format.

How will OFM Forms help you? First, it will reduce the amount of information that needs to be provided to complete multiple forms. Information such as Personal Identification Number (PID), name, mission, and so forth, will be stored in your Web browser for use in preparing new or additional forms or to correct or add information. Secondly, items that are required in order for OFM or OFM's Protocol Unit to process a form will be highlighted if the item is not completed. This feature helps to ensure faster processing as the completed form is less likely to be returned as a result of missing information. Third, all forms can be produced on standard 8.5x11 inch paper. Finally, an indexed and searchable version of the *Guidance for Administrative Officers* is provided. It can be used to assist you in preparing a form or to determine the proper requirements and procedure needed to apply for services. Mission members also may submit questions directly to OFM by e-mail at [OFMQuestions@state.gov](mailto:OFMQuestions@state.gov).

The OFM Forms application may be used on any IBM compatible computer running Microsoft Windows 95, 98, NT or Windows 2000 with

### (Telephone Bill continued from pg 3)

The total billing amount for each service provider included on the bill is displayed in the account summary.

#### Service Record Information

A detailed itemization of all the products and services on the customer's account is provided (see circles 8,9). Every new account will receive an itemization with the first bill. Business customers will receive this itemization each month. Residential customers will receive it once a year, but can request a more frequent itemization.

#### Bill Messages

Bill messages are displayed in specific locations on the bill (see circle 3). For instance, Verizon displays messages pertaining to its charges on certain pages of the bill. Other service providers display messages pertaining to their charges on their pages of the bill.

### Refund of New York State Sales Tax When OFM Tax Card is Not Accepted

Anyone with diplomatic tax-exemption privileges who paid New York state sales tax on goods eligible for tax exemption may obtain a refund of the tax paid by filing Form AU-11 with the New York State Department of Taxation and Revenue. Upon presentation of proper proof (a photocopy of the OFM-issued tax-exemption card, a receipt invoice showing the purchaser's name [the name on the receipt must be the same name as on the OFM-issued tax-exemption card], and a receipt that shows the amount of tax paid), the New York State Tax Department will refund the amount of the tax paid with interest.

The Form AU-11 Refund Application may be obtained by calling 1-800-972-1233. It may also be obtained by calling New York State's fax-on-demand system at 1-800-748-3676 (code #11001) and at the Tax Department's website: [www.tax.state.ny.us](http://www.tax.state.ny.us) ("Forms and Publications", "Sales Tax (current period)", under "Other Sales Tax Forms" at the bottom of the page).

Microsoft Internet Explorer 5.x or better (a platform independent version is in the works). The CD-ROM that will be distributed by OFM contains all the applications required to use the application with the exception of the Microsoft Windows operating system. The application may be installed on a single machine or can be incorporated into a mission's internal network.

\*OFM is making changes to *Guidance for Administrative Officers*, which will be released in CD-ROM format.

## consultations

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